

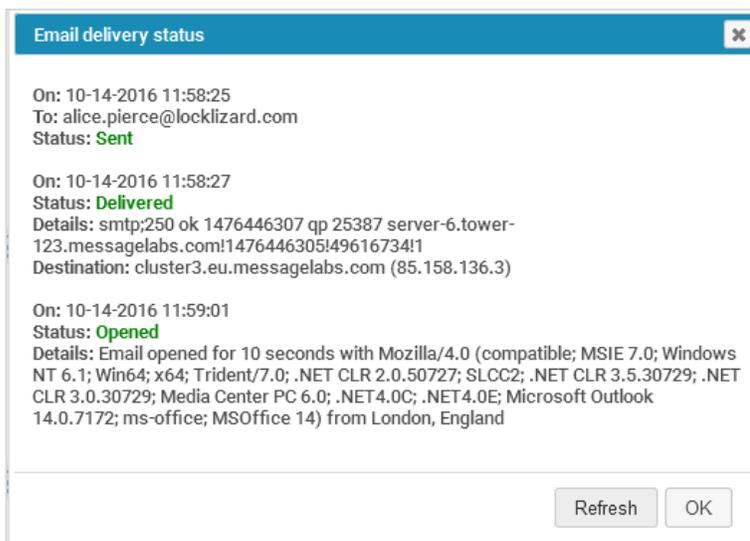
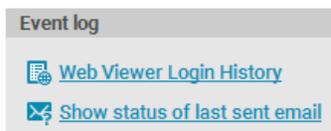
## Safeguard 4 & Enterprise 5 – Admin System Update (Build 171)

These new Admin System releases of Safeguard PDF Security and Enterprise PDF DRM provide Publishers with a completely new license file email delivery and tracking system, greater flexibility and search facilities, additional user and system information, logging and various system changes.

Safeguard Enterprise has been further enhanced to support sub-administrator accounts with separate publisher admin logins, Geolocation at the customer level, automatic IP and country detection, statistics on most accessed/viewed/printed documents, and additional filtering capabilities and batch options.

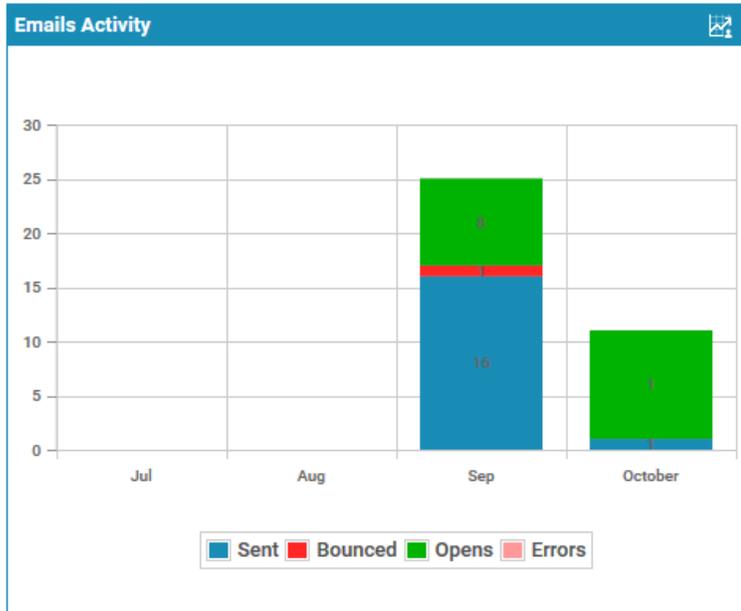
### 1. New Email delivery system with tracking and statistics

- a. You no longer need to worry about whether a user has received their license file email or Web Viewer login details. License and login emails are now sent via a third party system to ensure they are sent quickly (usually within 10 seconds) and are not rejected as SPAM by recipient mail servers.
- b. You can track the email delivery status for each user from the customer's details page > Event Log > Show status of last sent email. This records when an email was sent, delivered, opened, or bounced.



- c. A new graph showing license file email activity is accessible from the statistics area.

This information gives you a quick graphic overview of how many emails have been sent, and whether they have been delivered, opened or bounced.



## 2. New email saving option

You can now save a user's license file email (the complete email text sent by the Administration System) as an .eml file or open it directly in your email application.

**License Information**

Licenses:

License: [Save to file](#)

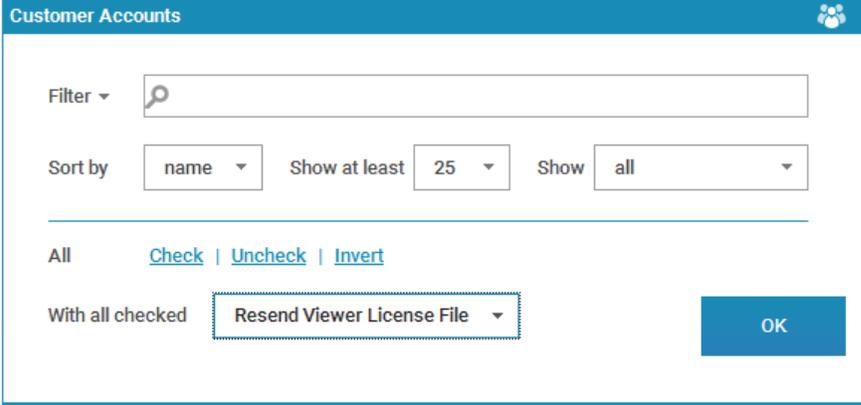
Resend:  email license

[Save email](#)

This is handy if the user wants their license file email sent to a different or additional email address to that stored in their customer record since the license file email can now be quickly forwarded on.

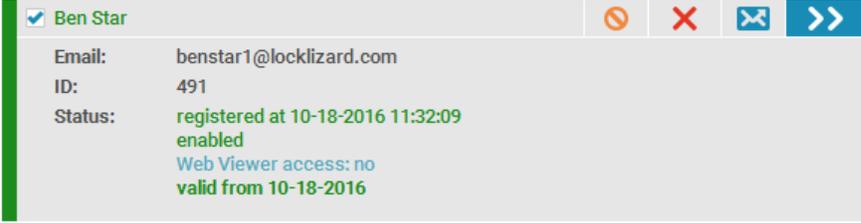
### 3. New email sending options for controlled rollouts

You can now select multiple users on the Customer Accounts Tab to resend their Viewer license email or the Web Viewer login details.



The screenshot shows the 'Customer Accounts' interface. At the top, there is a search bar labeled 'Filter' with a magnifying glass icon. Below it, there are controls for 'Sort by' (set to 'name'), 'Show at least' (set to '25'), and 'Show' (set to 'all'). A horizontal line separates these from the action area, which includes 'All', 'Check', 'Uncheck', and 'Invert' links. Below these links, there is a section labeled 'With all checked' containing a dropdown menu currently set to 'Resend Viewer License File' and an 'OK' button.

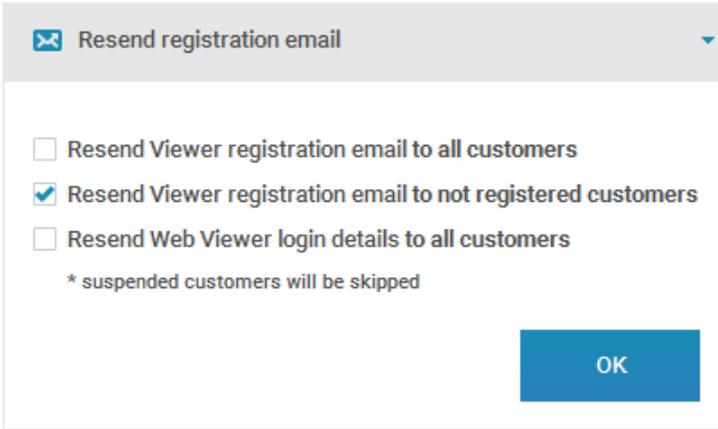
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The screenshot shows a user account detail for 'Ben Star'. The account is checked. To the right of the name are icons for a warning, delete, email, and refresh. The details listed are: Email: benstar1@locklizard.com, ID: 491, Status: registered at 10-18-2016 11:32:09, enabled, Web Viewer access: no, valid from 10-18-2016.

This is useful for sending controlled rollouts of license files to a limited number of users at a time.

Safeguard Enterprise also enables you to batch resend license files to all users that have not registered their licenses, in a single operation.



The screenshot shows a dialog box titled 'Resend registration email'. It contains three checkboxes: 'Resend Viewer registration email to all customers' (unchecked), 'Resend Viewer registration email to not registered customers' (checked), and 'Resend Web Viewer login details to all customers' (unchecked). Below the checkboxes is a note: '\* suspended customers will be skipped'. An 'OK' button is located at the bottom right of the dialog.

#### 4. SMTP email alias

If you choose to use your own SMTP server for the sending emails you can now change the alias name of the sender's email address from 'Locklizard Licensing' to any name that you wish.

Sender Name:	BlueSea Productions
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#### 5. Viewer license and Web Viewer login email delivery

When adding customers, you now have the option of enabling/disabling the sending of Viewer license files and Web Viewer login emails separately. Previously both emails were either enabled or disabled - now you can choose to send either or both.

License Information
<input checked="" type="checkbox"/> Email license
Web Viewer
<input type="checkbox"/> Enable Web Viewer
<input type="checkbox"/> Email login details

#### 6. Sub Administrators - separate access controls and logins

Safeguard Enterprise now supports the management of sub-administrators, and Publishers can login to the admin system using separate usernames and passwords.

Actions performed by each sub-administrator are logged separately so you can see what action/event was performed by which sub-administrator.

Sub Accounts			
Username	Permissions	Notes	Date Added
<input type="checkbox"/> bennyrogers@locklizard.com	Admin System, eCommerce (Read Only)		10-14-2016
<input type="checkbox"/> galelong@locklizard.com	Admin System		11-09-2016
<input type="checkbox"/> justinmarlow@locklizard.com	eCommerce		11-09-2016
<input type="checkbox"/> shellywilkins@locklizard.com	Admin System (Read Only)		11-09-2016
<input type="checkbox"/> tonymaidstone@locklizard.com	eCommerce (Read Only)		11-09-2016

5/5

Sub -administrators can be given either full or read only access to both the admin system and ecommerce commands. Read only access enables sub-administrators to look up account information (i.e. see when a license file email was sent, or list customers using ecommerce commands) but not alter or delete it.

## 7. Customer level Geo-IP access and IP/country auto-detection

Safeguard Enterprise Publishers can now block or allow access at the specific country level for individual users. This gives you much more flexibility for controlling location access to your protected documents.

**Restrict Location**

IP:

Auto Detect & Restrict

Country:

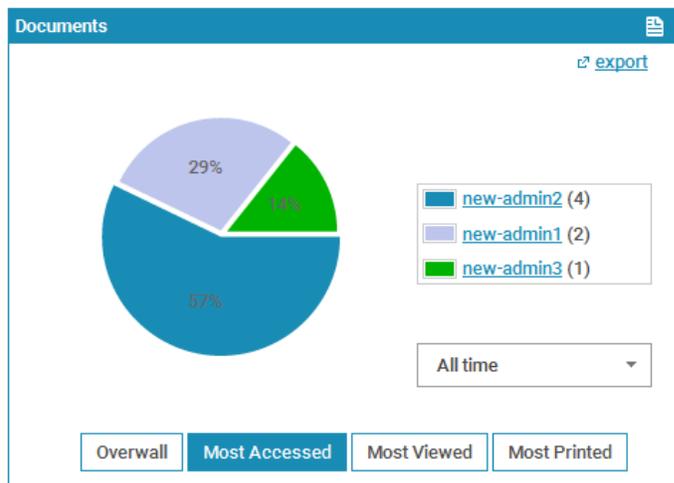
Auto Detect & Restrict

For example, you may have a policy that allows only users located in the US to use your protected documents but you want to allow access to a specific user from a different country. Or you may want to block a specific country at the global level but allow access from that country for a specific user.

If you don't know the user's IP address or country location, then you can let Safeguard pickup and enter this information for you when the user registers their license or uses the Web Viewer for the first time. This saves you having to look up and manually enter the information after a user has first registered.

## 8. Statistics for most accessed, viewed and printed documents

Safeguard Enterprise Publishers can see which are their top 5 most accessed, viewed and printed documents and export this information to a CSV file. The CSV file also shows the users who have accessed/viewed/printed those documents and the date this occurred.



## 9. Additional user and system information

Additional information is now recorded and displayed for documents, publications, and customers, extending the data available for you to process in CSV format.

- a. The operating system that users register the Viewer on – Mac, Android, iOS, Windows – is recorded in the Customer event log so you have a better understanding of the environments your customers are using to read your protected documents in.

```
11-01-2016 19:45:40 - Registration successful(license reuse). From:
109.149.65.42 (BC-AE-C5-22-6B-22-285072491425) 🇬🇧 (Windows)
```

- b. When you export Customers, the CSV file now includes their license file link.

This enables you to have all customer license files in one place, and the ability to send licenses to existing customers without having to connect to the administration system.

A	B	C	D	E	F	G	H	I	J	K	L	M
ID	Name	Email	Company	Created at	Expires at	Registered	Registered	Licenses	Suspended	Documents	Publications	License
1	Alice Pien	alice.pien@bluebird	Bluebird	05-26-2011	never	yes	05-26-2011	2	no			https://llgecko4.com/v5b171/enterprise/?action=getvlic&un=0a798fe
491	Ben Star	benstar1@locklizard		10-18-2011	never	yes	10-18-2011	2	no			https://llgecko4.com/v5b171/enterprise/?action=getvlic&un=51a018b

- c. When you 'export Customers' in Safeguard Enterprise, customer notes are also exported.
- d. Publications now also show the number of customers who have been given access and the number of documents protected to them.

Customers	Documents
 <a href="#">view</a> (4)	 <a href="#">view</a> (0)
 <a href="#">view</a> (6)	 <a href="#">view</a> (3)

- e. In Safeguard Enterprise, you can now also export just expired or suspended documents.

**Export documents** 

Export: All

Format: All  
Protected for Web  
Expired  
Suspended

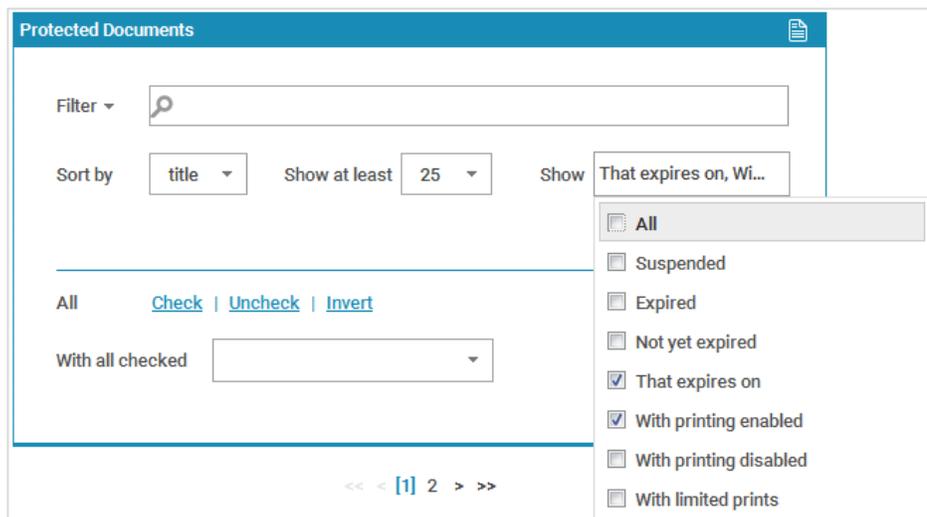
Export

- f. When you export Publications the CSV file now includes the publication creation date and whether the start date is obeyed or not.

## 10. Filters, search and display options

Additional filters and search and display options have been added to help you find the customers and documents you are looking for more easily.

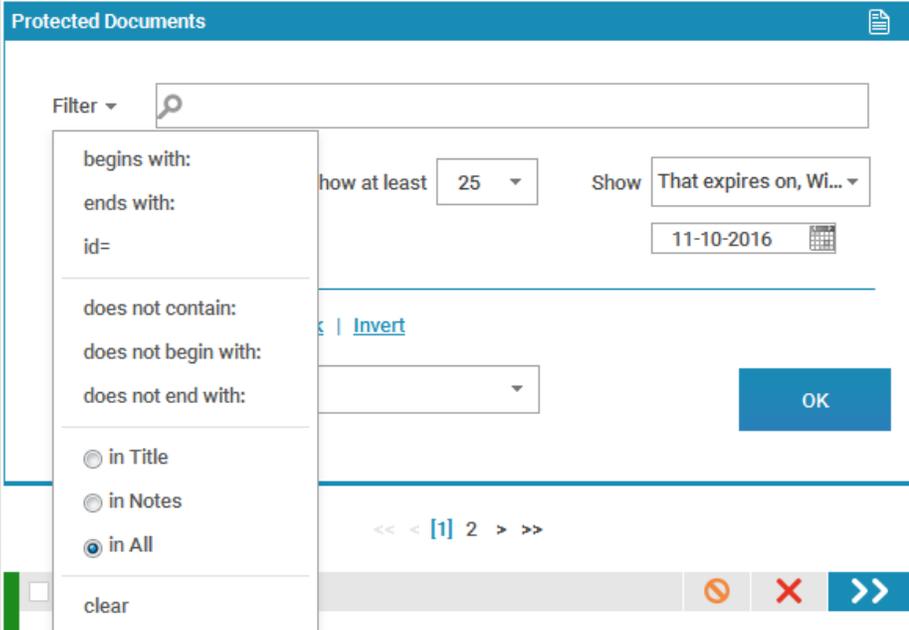
- a. The Documents Tab > Show combobox now has extra checkbox options and you can select two filters to be applied. For example, you can show all documents that have been protected to a publication with limited views, or documents protected for all customers with print logging enabled.



- b. In Safeguard Enterprise, the Documents Tab > Show combobox now provides the following additional sort options:

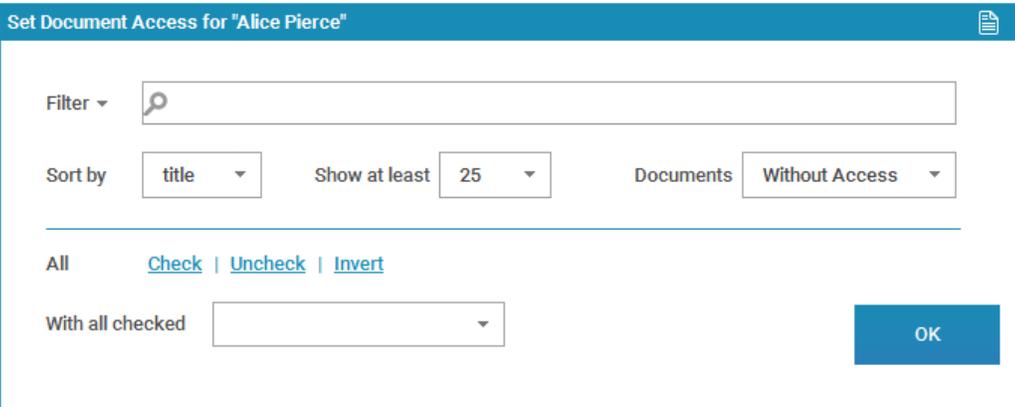
- With printing enabled
- With printing disabled
- Validity check=never
- Validity check=always
- With print logging enabled
- With view logging enabled
- Protected to publications

- c. In Safeguard Enterprise, you can apply filters to search options in order to provide finer granularity for items you are searching for.

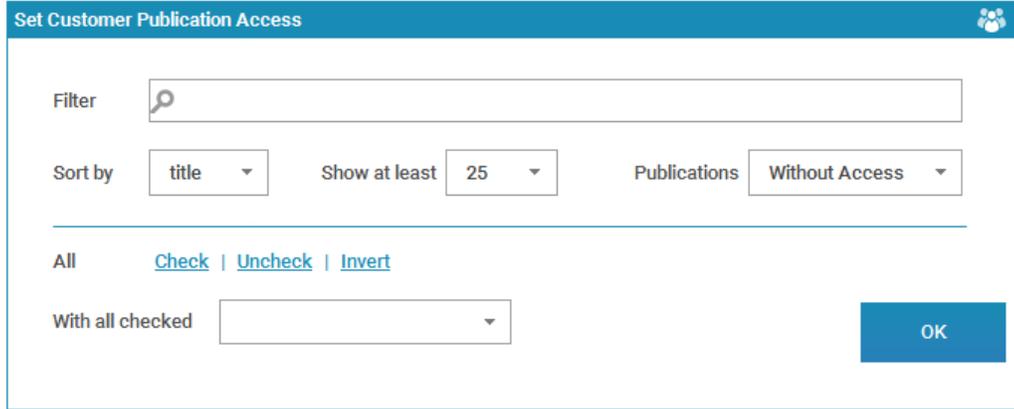


For example, you might want to only display documents that begin with certain characters in their names or just search for text within document notes.

- d. Document and customer notes are now searchable so that you can find similar records more easily. For example you might want to enter a keyword for a group of customers or documents so you can later search on them. You may now use these fields in a structured way.
- e. When assigning direct document access for a customer, you can show all documents (protected for selected customers) that customer currently does not have access to.



- f. When assigning publication access for a customer, you can show all publications that customer currently does not have access to.



Set Customer Publication Access

Filter

Sort by  Show at least  Publications

All [Check](#) | [Uncheck](#) | [Invert](#)

With all checked

OK

## 10. Batch changes

Safeguard Enterprise provides the following additional batch changes:

- Batch change document prints - for every customer grant an extra print to document X
- Resend license files to all users that have not registered

## 11. Ecommerce Commands

New ecommerce commands have been added to support new administration system functions and provide more flexibility for license file delivery and control over individual licenses.

- a. You can resend a license file or Web Viewer login details to one or many users.
- b. You can resend customer license files regardless of whether the admin system has been configured to send them or not. For example, email sending is turned off in the admin system but you can now send licensing emails to specific customers regardless. You can also prevent license emails being sent when adding customers even if 'set license delivery' is turned on in the admin system.

- c. You can restrict a customer account to an IP address so the customer can only register their license and use documents from that IP address - Safeguard Enterprise only.
- d. You can restrict a customer account to a country so the customer can only register their license and use documents from that country - Safeguard Enterprise only.
- e. You can enable or disable multiple simultaneous Web Viewer logins.

## 12. System operational changes

The Administration System has undergone some operational changes to make options more logical.

- a. Customer > Set Document Access now has only the following choices: with access, without access. Only documents that were protected for 'selected customers' in the Writer will be displayed here.
- b. Document > Grant or Revoke Access. This option is not available if the document was protected for all customers (all users will already have access) or to a publication. You cannot grant access to a single document in a publication as doing so would grant access to all documents in that publication – i.e. the same as granting publication access. If you had previously granted individual users limited access to documents protected for all customers then these will still be displayed for backwards compatibility.
- c. Expired dates for direct document access are now shown in red rather than green font so you can clearly see if a document has expired from a quick glance of the system.
- d. If a publication is deleted, so are all the document records associated with that publication since they are no longer valid.
- e. You can now use the publication ID (rather than name) when importing customers. This can be more convenient if your publication names are either long or similar. Multiple publication IDs are supported and can be separated with semicolons.
- f. When protecting documents to USB, invalid documents are now skipped. An invalid document for example could be one that you still have the PDC file for on disk but have deleted the corresponding document record from the admin system.

### 13. Bug Fixes

- a. If you give users limited access to a publication then any documents you publish after having given the user access will not be viewable – access will be denied.
- b. Ecommerce revoke\_document\_access was not recognized as a command – the system would only accept revoke\_file\_access.
- c. Ecommerce commands update\_views, update\_prints, and add\_customer\_licenses enabled you to go into negative numbers.